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## **Hong Kong**

### **Market Development Reports**

#### **Hong Kong Dairy Products Market Brief**

**1999**

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#### **Report Highlights:**

**Although American dairy products are generally perceived as high quality, marketing has not been successful in Hong Kong because of higher product pricing, lack of promotion, and inconsistent marketing efforts. The import approval process for dairy products is extensive and time consuming, leading to erratic and inconsistent supplies. Competitors have taken advantage of this to improve their market share.**

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Includes PSD changes: No

Includes Trade Matrix: No

Unscheduled Report

Hong Kong [HK1], HK

## **TABLE OF CONTENTS**

	<b><u>Page</u></b>
INTRODUCTION	2 - 5
I. Milk Products	6 - 25
OTHER DAIRY PRODUCTS	
II. Yogurt	26 - 29
III. Ice Cream	30
IV. Cheese	31
V. Butter	32 - 37
VI. Whey	38 - 40
SUMMARY & CONTACTS	41 - 48

## INTRODUCTION

### # Methodology

The goal of this report is to provide a brief assessment of the dairy products market in Hong Kong, as well as future developments.

There are eight products covered in this report, separated into two sections. The first section covers conditions for milk products. The second section covers five different dairy products.

#### Milk Products

Fresh/UHT/other milk  
Powdered Milk  
Evaporated Milk  
Condensed Milk

#### Other Dairy Products

Yoghurt  
Ice Cream  
Cheese  
Butter  
Whey

For Hong Kong dollar currency figures, the exchange rate is US\$1 = HK\$7.78.

### # Executive Summary

American dairy products are not popular in the Hong Kong market. Dairy products are dominated by Australian/New Zealand imports.

American dairy products are generally perceived as high quality, which is a distinct advantage to most US suppliers. However, Americans are not successful in Hong Kong because of higher product pricing, as well as a lack of promotion and inconsistent efforts in marketing their dairy products. Of equal importance is that the import approval process is extensive and time consuming. As a consequence, supply has been erratic and inconsistent, a situation other importers have taken advantage of to improve their market shares in Hong Kong. Also, local legislation has specified only two categories [UHT and fresh] but in the marketplace there are three types as listed below.

#### Unpasteurized Milk

Unpasteurized milk is predominately sourced from China due to Hong Kong's leading supplier Dairy Farm's close proximity to Hong Kong.

#### Fresh Pasturized/Sterilized Milk

A growing market dominated by three local producers offering a wide range of products and flavors. Not an import market.

#### UHT

A declining market dominated by imports from Australia, New Zealand and Europe. A weak U.S. presence.

## INTRODUCTION

### Evaporated Milk

A steadily growing and large market with huge per capita consumption in tea/coffee and desserts. Dominated by Holland. A weak U.S. presence.

### Condensed Milk

A declining market for both sweetened and unsweetened products used in spreads and desserts. Dominated by Nestle with imports from their China factory. A weak U.S. presence.

### Yogurt

A rapidly growing market with one local producer, “Nestle”, with intense competition from European imports, and also by Danone from its South China factory. New Zealand and Australia products are also very competitive. A very weak U.S. presence.

### Ice Cream

Nestle dominates the market, but U.S. imports dominate the premium market segment, i.e. Haagen Dazs and Dreyers. U.S. suppliers have a strong and growing position in this market segment.

### Cheese

Overall a weak U.S. presence with the exception of Kraft Foods with processed cheese slices. New Zealand and Australia dominate the lard and processed cheese segments. European suppliers dominate the fresh cheese sector.

### Butter

A weak U.S. presence with New Zealand, Australia and European products dominating the market.

### Whey

Imports are destined for China. A strong U.S. position though Canada, New Zealand and Australia have been aggressive in their efforts to gain market share.

## # Market Access Statement

## LABELING REQUIREMENTS

The Food and Drugs (Composition and Labeling ) Regulations require food manufacturers and packers to label their

products in a prescribed, uniform and legible manner. The following information is required to be marked on the label of all prepackaged food except for 'exempted items' as provided in the Regulations. Prepackaged food means any food packaged in such a way that the contents cannot be altered without opening or changing packaging and the food is ready for presentation to the ultimate consumer or a catering establishment as a single food item.

1 Name of the Food

- a) Prepackaged food shall be legibly marked or labeled with its name or designation.
- b) The food name should not be false, misleading or deceptive but should serve to make the nature and type of food known to the purchasers.

2 List of Ingredients

- a) Preceded by an appropriate heading consisting of the words "ingredients", "composition", "contents" or words of similar meaning, the ingredients should be listed in descending order of weight or volume determined as at the time of their use when the food was packaged.
- b) If an additive constitutes one of the ingredients of a food, it should be listed by its specific name or by the appropriate category (e.g. Preservative, artificial sweetener, etc.) Or by both name and category.

3) Indication of "best before" or "use by" date

Prepackaged food shall be legibly marked or labeled with the appropriate durability indication as follows:

- a) a "best before" (in Chinese characters as well) date; and
- b) in the case of a prepackaged food which, from the microbiological point of view, is highly perishable and is likely, after a short period, to constitute an immediate danger to human health, a "use by" (in Chinese characters as well) date.

The words "use by" and "best before" in English lettering and Chinese characters followed by the date up to which specific properties of the food can be retained, to indicate the shelf life of the food. The "use by" or "best before" date should be shown either in Arabic numerals in the order of day, month and year (or month and year in certain circumstances) or in both the English and Chinese languages. For specific details refer to the Regulation.

Home Page: <http://www.info.gov/justice>

4) Statement of Special Conditions for Storage or Instruction for Use

If special conditions are required for storage to retain the quality or special instructions are needed for prepackaged food use, a statement should be legibly marked on the label.

5) Name and Address of Manufacturer or Packer

Prepackaged food shall be legibly marked or labeled with the full name and address of the manufacturer or packer, except under the following situations:

- a) The package is marked with an indication of the country of origin and the name and address of the distributor or brand owner in Hong Kong, and the address of the manufacturer or packer of the food in its country of origin has been notified in writing to the Director of Health.
- b) The package is marked or labeled with an indication of its country of origin and with a code marking identifying the manufacturer or packer in that country and particulars of the code marking and of the manufacturer have been notified in writing to the Director of Health.
- 6) Count, Weight or Volume

The food label should include the numerical count or net weight or net volume of the food.

- 7) Appropriate Language

The marking or labeling of prepackaged food can be in either the English or the Chinese language or in both languages. If both the English and Chinese languages are used in the labeling or marking of prepackaged food, the name of the food and the list of ingredients shall appear in both languages.

**Exempt from labeling regulations:** Individually wrapped confectionery products and preserved fruits intended for sale as a single item; Prepackaged foods for sale to catering establishment for immediate consumption and those containing more than 1.2 percent alcohol by volume.

Under the amended Food and Drugs (Composition and Labeling) Regulations, it is an offence to sell any food after its “use by” date. Furthermore, any person who, not being the food manufacturer or packer or without their written authorization, removes or obliterates any particulars on the label required under these regulations also commits an offence.

### IMPORT DUTIES

Hong Kong is a free port which does not impose any import tariffs on products with the exception of four dutiable products: liquor, tobacco products, hydrocarbon oils and methyl alcohol. Local importers have to apply for a licence from the Hong Kong Customs and Excise Department for the importation of dutiable commodities. In addition, a licenced importer has to apply for a permit for each and every consignment. The current duties are as follows:

Cigarettes per 1000 sticks	US\$98.45
Cigars per kg	US\$126.74
Beer & liquor with less than 30% alcohol	: 30%
Liquor with more than 30% alcohol	: 100%
All wines:	60%

## MILK DEFINITION

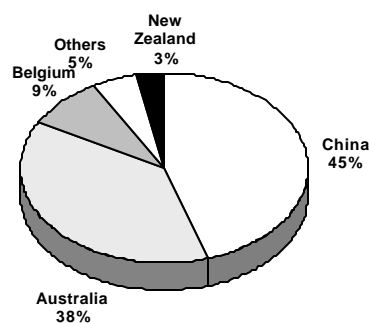
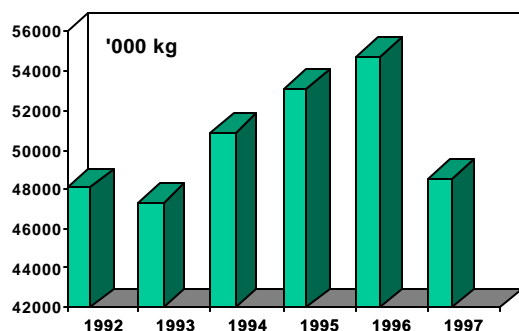
The following are definitions for milk products

- # **Untreated milk:** directly from milk farms located in Southern China.
- # **Liquid milk:** including
  - C Fresh milk made locally from untreated milk and/or powdered milk
  - C UHT milk which is ultra heat treated for long shelf life and requires no refrigeration.
  - C Sterilized milk which is mostly made from milk powder.
- # **Evaporated milk:** Whole or skim milk with up to 60% of the water removed, sterilized and then canned.
- # **Condensed milk:** Whole milk with 60% of the water content removed and then heavily sweetened.
- # **Powder milk:** In bulk solid form. No local production, all of which is imported.

## LIQUID MILK IMPORTS

- # Liquid milk imports into Hong Kong experienced two periods of decline over the past five years: during 1993, and in 1997.
  - C In 1993, overall beverage product imports declined due to a weak economy causing reduced consumption.
  - C A weakened economy in 1997 also caused liquid milk consumption to decline, as milk is not considered a basic dietary necessity.
  - C More importantly, in 1997 the fresh milk segment experienced increased demand, displacing a certain percentage market share of UHT milk.
- # 1998 and 1999 imports are expected to remain stagnant.
  - C A weak economy in 1997 is expected to last through 1998, resulting in flat/declining milk demand.
  - C Fresh milk consumption is expected to further outgrow and displace imported UHT milk.
- # China is the largest exporter of milk into Hong Kong (45% in 1997), but this is primarily untreated milk to be processed in Hong Kong.
  - C These imports occur on a daily basis, coming directly from farms in Guangdong that are owned by local milk producers.
- # Other major importers are Australia (Paul's, UHT Dutch Lady and Devondale UHT), Belgium (Dutch Lady sterilized) and New Zealand UHT products.
  - C American imports are insignificant (less than 1% of import share) due mainly to lack of market activities and local support.

**Liquid Milk Imports 1992-97 by Volume**



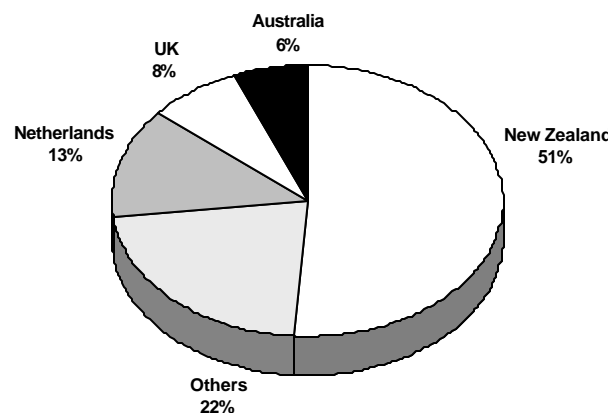
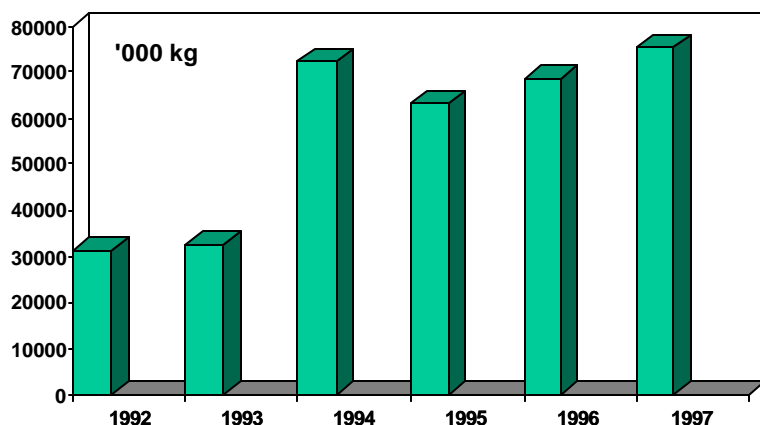
**Liquid Milk Imports by Country 1997**

Source: Hong Kong  
Census and Statistics  
Department (HKCSD)

## POWDERED MILK IMPORTS

- # Imports of powdered milk have been consistently increasing over the past five years.
  - C A sudden surge in powdered milk imports in 1994 were largely due to the rapid increase in demand from China where significant amounts of powdered milk are transhipped.
- # Apparently, powdered milk imports for Hong Kong consumption were not adversely affected by a weak economy in 1997.
  - C Industrial applications increased in 1996 and in the first half of 1997, driving local powdered milk demand. Local milk processing uses both powdered milk and untreated milk in the production of liquid fresh milk.
- # Powdered milk imports however, are expected to remain flat or marginally improve in 1998. The weak local economy is being cited as the main reason.
- # New Zealand is the largest supplier of powdered milk, accounting for over 50% of total imports.
  - C Other major importers include the Netherlands, UK and Australia.
  - C American imports account for only 2%, with Ampere as the more visible American powdered milk supplier.

**Powder Milk Imports 1992-97 by Volume**



**Powder Milk Imports by Country 1997**

Source: HKCSD



## OTHER IMPORTS

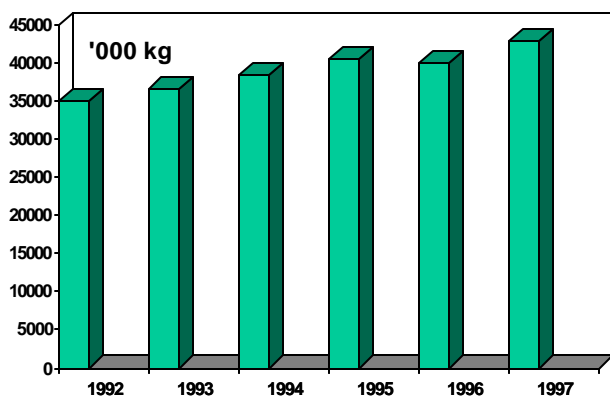
### Evaporated Milk

- # Imports of evaporated milk have been increasing at a constant rate from 1992 to 1997.
  - C Annual increases have been 2-3% on average.
- # The import trend reflects local consumption growth.
- # 1998/99 imports are expected to sustain marginal growth.
- # Major importers are the Netherlands (Black & White, Dutch Lady), Singapore and Malaysia (both exporting Double Happiness).

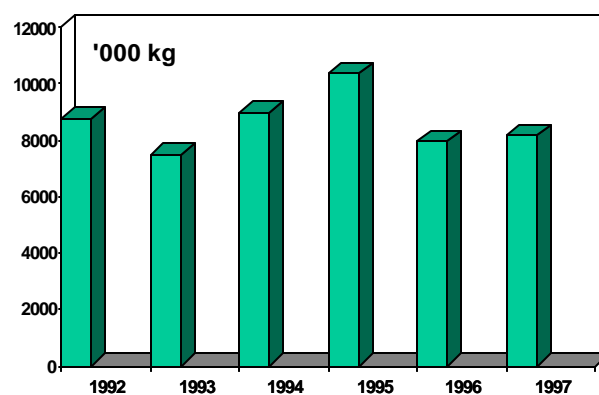
### Condensed Milk

- # Condensed milk imports have been erratic.
  - C Large growth imports in 1994 and 1995, due to increased re-exports to China
- # 1997 imports have been flat since 1996.
- # Import volumes are expected to slightly decline during 1998
- # The largest suppliers are China (33%) and the Netherlands (21%).

Imports of Evaporated Milk 1992-97 by Volume



Imports of Condensed Milk 1992-97 by Volume

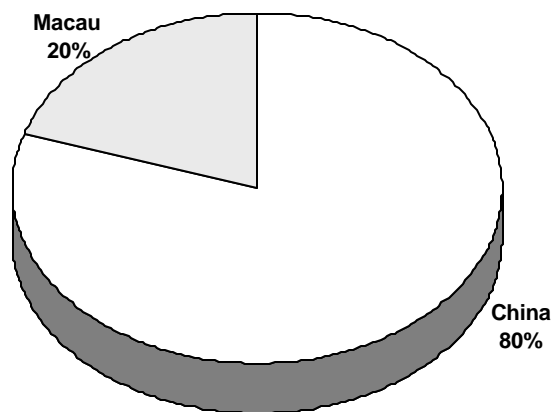
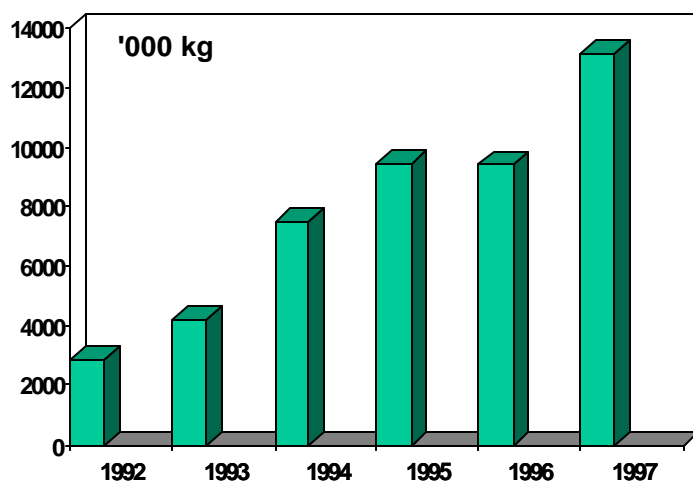


Source: HKCSD

## LIQUID MILK RE-EXPORTS

- # Re-exports of liquid milk i.e. UHT, sterilized, have surged more than five times over the past five years.
  - C Volumes increased from 2,800 MT in 1992 to more than 13,000 MT in 1997.
  - C A surge in demand from Mainland China caused milk transshipments to increase.
  - C As China has experienced little affect from the Asian crisis in 1997-98, milk re-exports from Hong Kong to China have grown by 30% from 1996 to 1997.
- # China will continue to drive re-export demand during 1998 and 1999, but the growth rate is expected to be more moderate and stabilize.

Liquid Milk Re-exports 1992-97 by Volume



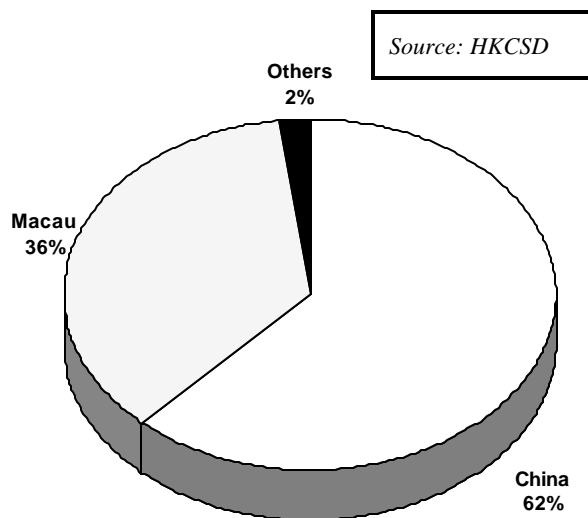
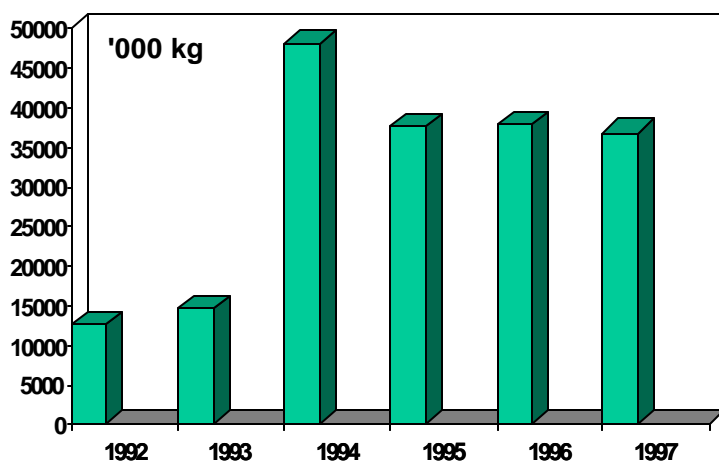
Liquid Milk Re-exports by Destination

Source: HKCSD

## POWDERED MILK RE-EXPORTS

- # Re-exports of powdered milk peaked in 1994 growing by more than three fold from 1993 levels.
  - C China was the primary driving force as local demand surged and explosive growth occurred.
  - C China also drove up Macau's volume intake by over three times, with a significant portion eventually being re-exported to the Chinese Southern provinces.
- # Powdered milk re-exports dropped about 15% in 1995, and have remained flat throughout 1996 and 1997.
  - C Overstocking from 1994 forced an import decline in early 1995.
  - C As stock levels came to a balance, imports increased, and have remained relatively stable since then.

**Powder Milk Re-exports 1992-97 by Volume**



**Powder Milk Re-exports by Destination 1997**

## OTHER MILK RE-EXPORTS

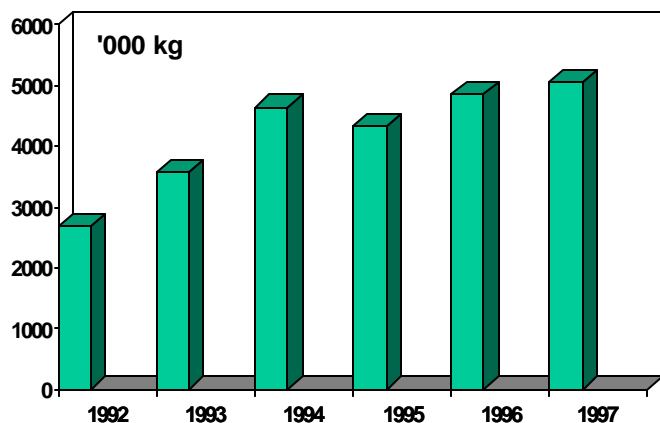
### Evaporated Milk

- # Re-exports of evaporated milk grew about 40% over a five year period from 1992 to 1997, reaching 5,000 MT in 1997.
- # However, re-export volumes are small compared to overall imports.
  - C Hong Kong consumes nearly 90% of the total imported evaporated milk.
- # Re-exports are almost exclusively to China and Macau.

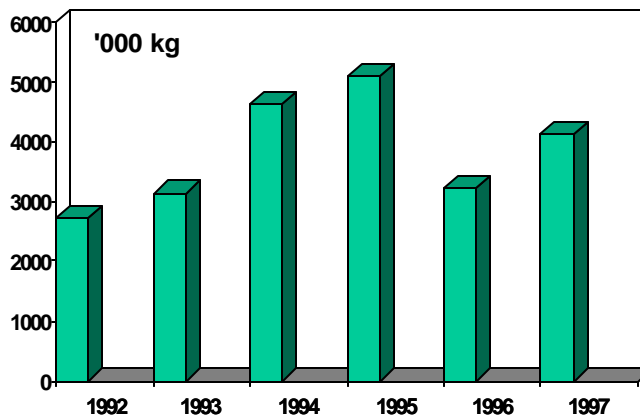
### Condensed Milk

- # The condensed milk re-export pattern has been rather irregular.
  - C There has not been any clear trend (Refer to graph below).
- # Condensed milk re-exports are almost exclusively to China and Macau.
  - C Macau will in turn re-export a significant portion of their imports to Southern China, primarily to Western Guangdong province.

Evaporated Milk Re-exports 1992-97 by Volume



Condensed Milk Re-exports 1992-97 by Volume



Source: HKCSD

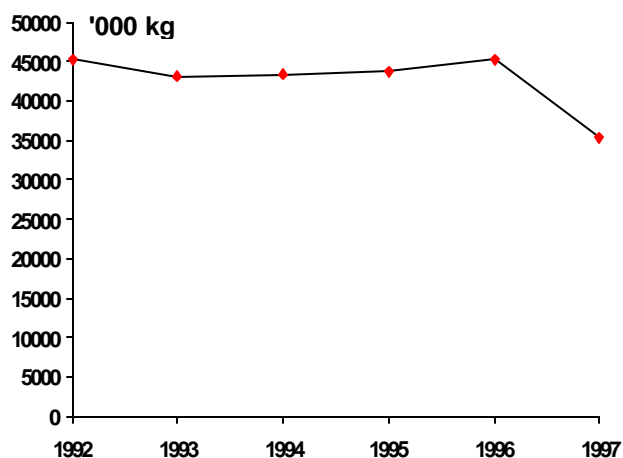
## **DOMESTIC MILK EXPORTS**

- # Hong Kong exports very little dairy products as most are not produced locally.
  - C Some liquid milk and yogurt are domestically exported, but the quantity is insignificant compared to re-exports.
  - C Certain domestic exports are actually imported products being repacked in Hong Kong and then classified as a local product for export.
  
- # However, specialized milk products like buttermilk, curdled milk and cream are significantly exported from local producers.
  - C The final destinations are almost always China and Macau.
  
- # Although official statistics show local production figures for butter, no local production exists. Export figures may represent imported product repackaged with a Hong Kong label and then exported.

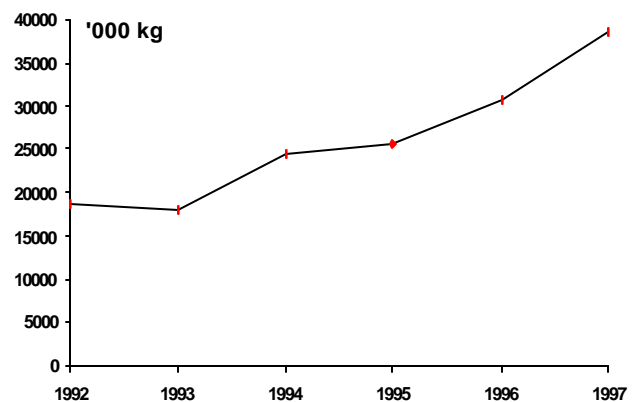
## LOCAL LIQUID AND POWDER MILK CONSUMPTION

- # Liquid milk demand had been marginally increasing from 1993 to 1996.
  - C Liquid milk products have been in an advantageous stage of growth. These products have benefited from the decline in demand for carbonated and still soft drinks, where some consumers have switched from soft drinks to mineral water and milk.
- # Local Consumption of milk in 1997 declined about 4-5% from 1996 and is about 40 million liters.
  - C The decline was triggered mainly by reduced consumer spending over the last quarter of 1997, affected by a weak economy.
- # Fresh milk consumption has increased 3-4% in 1997, however, imported milk demand declined more than 10%.
- # Powdered milk demand has dramatically increased at about 20% per year from 1993. In 1997 local consumption of powdered milk was about 39,000MT.
  - C The increase in powdered milk demand has been driven mostly by industrial applications, which primarily include local milk production and baking applications in recent years.

**Local Consumption of Imported Liquid Milk by Volume 1992-97**



**Local Powder Milk Consumption by Weight 1992-97**



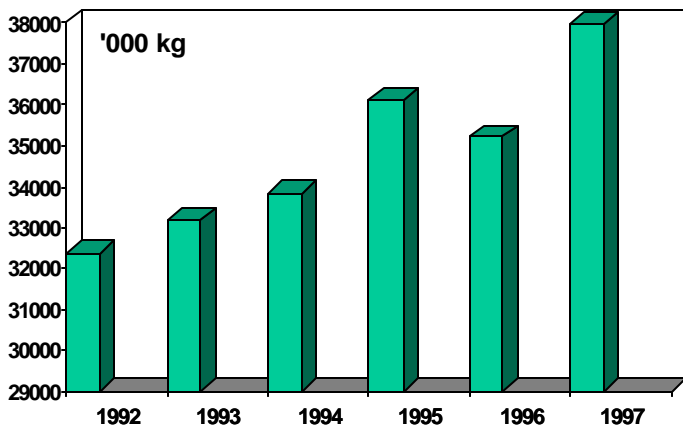
Source: Eastern Strategic Consulting Ltd.

## LOCAL CONSUMPTION OF OTHER MILK PRODUCTS

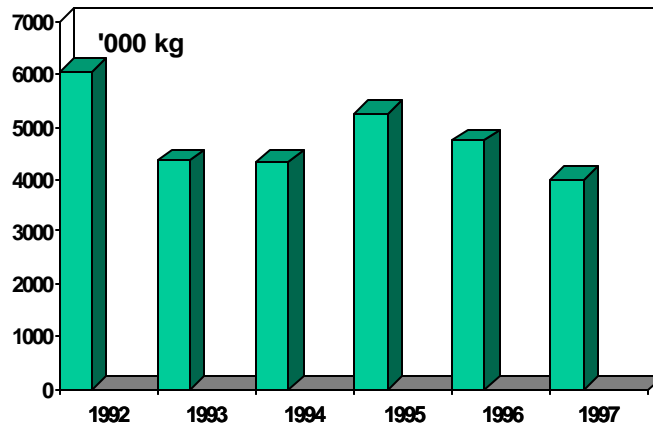
### Evaporated and Condensed Milk

- # Local consumption of evaporated milk has been directly proportional to imports. Evaporated milk sustained a consistent but marginal growth of 2-3% per annum.
  - C 1997 consumption of evaporated milk is estimated to be about 35,000 MT.
- # Hong Kong has one of the highest per capita consumption rates of evaporated milk in the world. Demand is mostly from small and medium sized diners/Chinese restaurants which use evaporated milk in the preparation of coffee and tea.
- # Consumption of condensed milk increased in 1995 from 1994, but has declined since then. In 1997 consumption was estimated to be about 4,000 MT.
  - C This decline is due to condensed milk demand being displaced by evaporated milk in restaurant preparations of coffee and tea.
  - C Health concerns (like sugar content, etc.) have also affected the demand for condensed milk.

**Local Demand of Evaporated Milk by Weight 1992-97**



**Local Demand of Condensed Milk by Weight 1992-97**

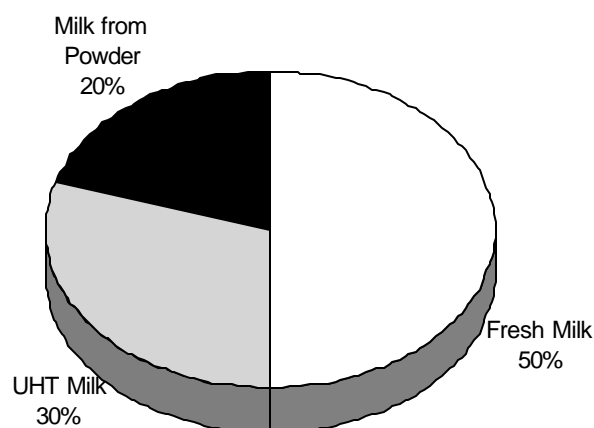


Source: Eastern Strategic Consulting Ltd.

## LIQUID MILK MARKET SEGMENTATION

- # Fresh milk has been the most popular type of milk in the Hong Kong market, occupying about half of the market in terms of volume.
  - C Fresh milk market shares are expected to increase at the expense of UHT milk, because of consumer perceptions. Fresh milk is considered to have a high nutritional value.
- # UHT milk at present is still popular with about a 30% market share.
  - C Paul's brand dominates the UHT milk segment.
- # Liquid milk from powder has been increasing in market share, and presently accounts for about 20% of local demand.
  - C As Dutch Lady and most local producers promote liquid milk made from powder, market share is expected to further increase.

Product Category	Market Share 1997 (%)
Fresh Milk	50
UHT Milk	30
Steilized Milk (Milk From Powder)	20
Total	100%

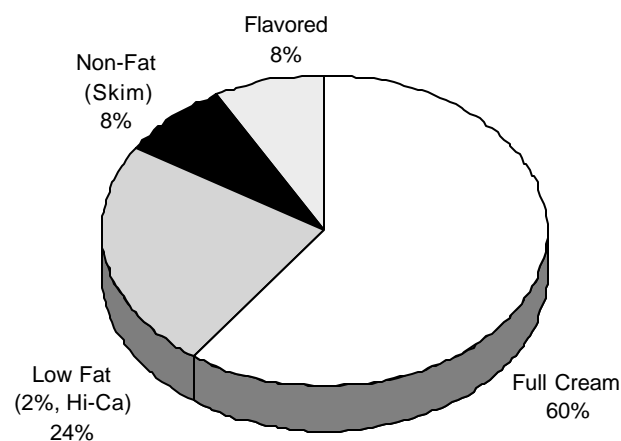


Source: Eastern Strategic Consulting Ltd.

## FRESH MILK SEGMENTATION

- # Full cream milk has been the most popular type of fresh milk consumed in Hong Kong, with a segment market share of 60%.
- # In recent years low fat milk (locally known as 2% fat/High Calcium milk) has consistently gained market share as consumers became more aware of the health benefits of this milk type.
- C At present low fat milk has sustained about a 24% market share in the fresh milk segment.
- # Non-fat milk (locally known as slim milk) has also gained popularity in recent years, but the volume is not substantial.
- C Although consumers have become increasingly concerned about health issues and consumption of fat, the lack of flavor of slim milk has been a factor inhibiting higher growth.
- C The current market share for slim milk is about 8% for the fresh milk segment.

Fresh Milk Type	Segment Market Share 1997 (%)
Full Cream	60
Low Fat (2%, Hi-Ca)	24
Non-Fat (Skim)	8
Flavored	8
Total	100%

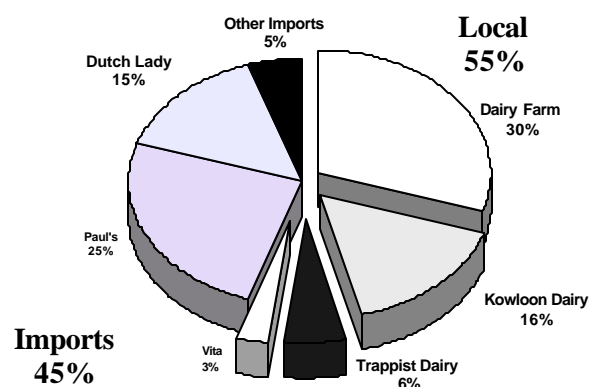


Source: Eastern Strategic Consulting Ltd.

## LIQUID MILK SUPPLY

- # At present there is slightly more local supply of liquid milk in the Hong Kong market as compared to the early 1990's.  
 C Local supply to imports ratio is about 55%:45%.
- # Nestle Dairy Farm is leading the local supply, while Paul's dominates the import sector.  
 C These two brands together account for over half of total liquid milk supply in Hong Kong.
- # Kowloon Dairy is generally perceived as being the best local product and is gaining market share.  
 C Strong competition from Kowloon Dairy may cause Dairy Farm's market share to decline in 1998-99.

Supplier	Market Share 1997 (%)	Total Segment 1997 Market Share (%)
<b>Imports</b>		
Paul's	25	Imports Total <b>45%</b>
Dutch Lady	15	
Other Imports	5	
<b>Local</b>		
Dairy Farm	30	Local Total <b>55%</b>
Kowloon Dairy	16	
Trappist Dairy	6	
Vita	3	
<b>Grand Total</b>	<b>100%</b>	<b>100%</b>

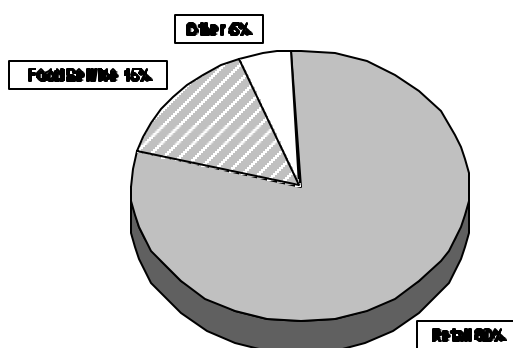


Source: Eastern Strategic Consulting Ltd.

## LIQUID MILK DISTRIBUTION

- # Liquid milk is distributed mainly through retail channels (about 80%).
  - C The chain supermarkets and department stores account for the majority of retail sales.
  - C Convenience stores are far less significant and focus mainly on impulse and emergency purchases.
- # The food service sector is a less important channel for milk distribution (about 15%).
  - C Channels include hotels, restaurants, and airline catering.
- # Others are far less significant (about 5%).
  - C Channels include hawkers, canteens, corner stores, etc.

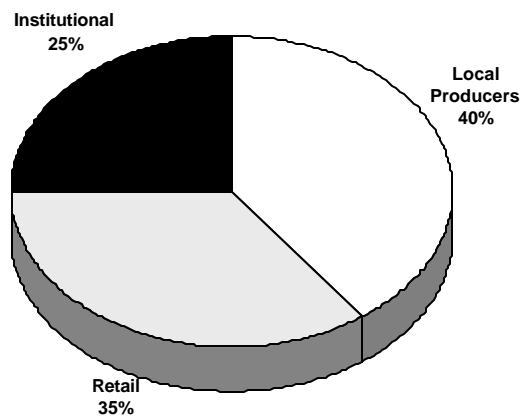
### Retail, Food Service and Other 1997



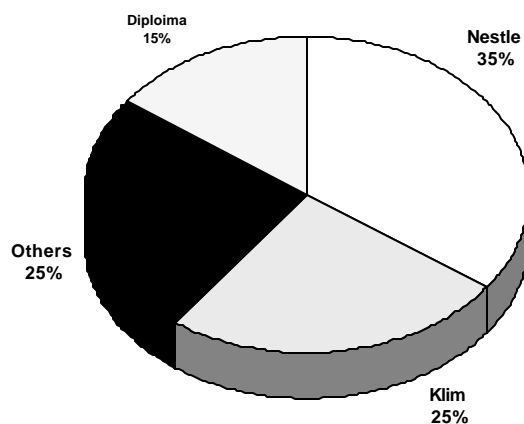
Source: Eastern Strategic Consulting Ltd.

## POWDERED MILK SUPPLY

- # Powdered milk is distributed through three channels.
  - C To local milk producers, in the production of liquid milk (~40%). Local producers use powdered milk in producing fresh drinking milk for the Hong Kong market.
  - C To retailers, which includes supermarkets and conveniences stores (~35%).
  - C To food processors, primarily in the baking industry (~25%).
- # Nestle is the largest supplier of powdered milk in the retail sector.
  - C Other major brands include Klim, Diploma, etc.
- # In the institutional sector, New Zealand is the leading powdered milk supplier.



**Powder Milk Distribution Channel 1997**  
Total Volume: 46,000 MT

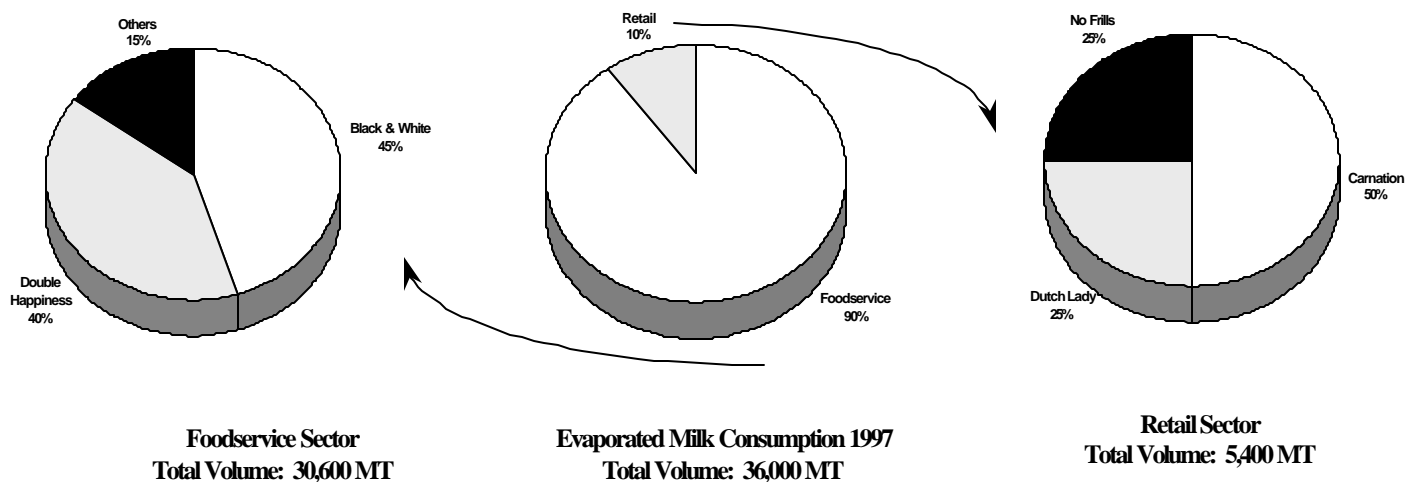


**Powder Milk Supply 1997**  
Total Volume: 46,000 MT

Source: Eastern Strategic Consulting Ltd.

## EVAPORATED MILK - SUPPLY

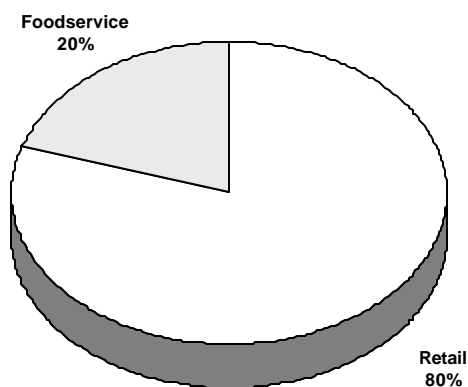
- # Evaporated milk is distributed in Hong Kong mostly to the foodservice sector (over 90% on a volume basis).
  - C The majority of end-users are the relatively low-end diners/small restaurants that serve low priced food and beverages. These diners are extremely popular and are abundant in every housing and commercial district.
  - C The leading brands in this segment are Black & White (Dutch) and Double Happiness (Malaysia). Together they account for over 85% market share.
  - C As this market segment is extremely price sensitive, the major brands dominate the market through low price penetration.
  - C Carnation and Dutch Lady are unpopular in this market segment primarily due to higher price points.
- # In the retail sector, evaporated milk is distributed mainly through supermarkets, but the overall percentage is small (about 10%).
- # Hong Kong has one of the largest per capita consumption levels for evaporated milk in the world.
  - C Diners are the major end-users
  - C Evaporated milk is used in the preparation of milk, coffee & tea, curry dishes, and in making puddings and other oriental desserts, which are very popular dishes among Hong Kong consumers.



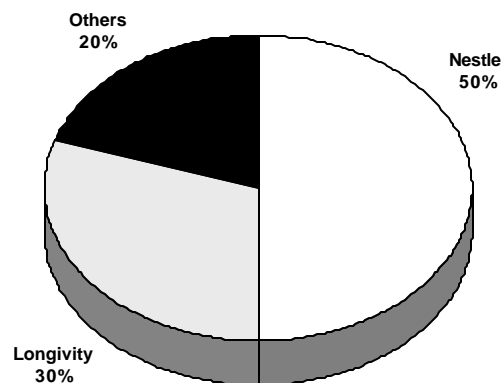
Source: Eastern Strategic Consulting Ltd.

## CONDENSED MILK SUPPLY

- # Condensed milk is being distributed mainly through retail channels (~ 80%).
- # The food service sector uses small quantities (~ 20%).
- C Condensed milk is used in preparing drinks like Holicks, Milo, and specific types of coffee and tea, etc. Also, sweetened condensed milk spread onto toasts, and used in some desserts.
- # The major suppliers of condensed milk are Nestle (Eagle brand with over 50% share) and Friesland Foods (Longevity brand, with over 30% share).



**Condensed Milk Distribution Channel**  
Total Volume: 4,000 MT

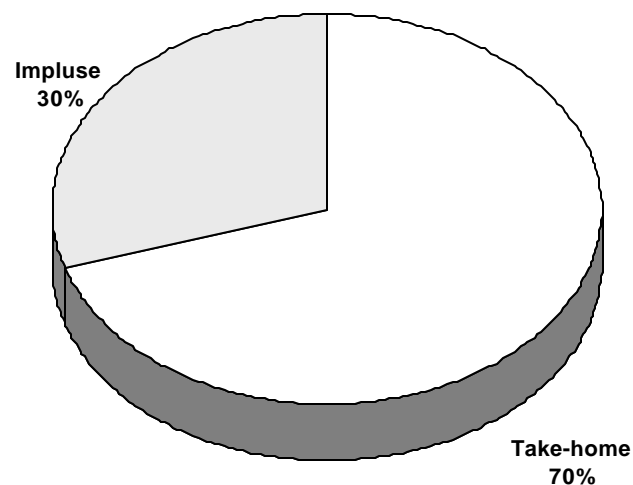


**Major Condensed Milk Supplier**  
Total Volume: 4,000 MT

Source: Eastern Strategic Consulting Ltd.

## MILK PURCHASE PRACTICES

- # Overall, milk products are purchased mainly through the retail channel for take-home consumption.
- # Impulse purchases include most purchases from convenience stores, in foodservice sector, and from other distribution channels.
- # Eastern Strategic Consulting Ltd. estimates about 70% of purchases are take-home purchases and 30% are on impulse/emergency.



**Impulse Versus Take-Home Purchases for Milk Products**

*Source: Eastern Strategic Consulting Ltd.*

## DISTRIBUTORS

### Major distributors of Milk Products in Hong Kong Market

Distributor/Manufacturer	Brands Dealing With	Product Offering	Market Positioning & Comments
Nestle Dairy Farm	Dairy Farm, Carnation, Eagle, Nespray	Liquid milk, evaporated and condensed milk	Current market leader with the largest product offering, but liquid milk market share declining
Kowloon Dairy	Kowloon Dairy	Liquid milk	Market share expected to further increase in 1998
Trappist Dairy	Trappist/Cross	Liquid milk	Secondary, but stable supplier
Sims Trading	Paul's	Liquid milk	Largest UHT supplier, but declining market
Friesland Foods HK	Dutch Lady	Liquid and powdered milk, evaporated and condensed	Second largest importer of liquid milk covering all scope milk products
New Zealand Dairy Board	Anlene	Liquid and powder milk	Market leader in milk powder, supplying premium powdered milk at higher price points.

**MILK PRICING & PACKAGING****Liquid Milk**

Brand	Product	Price (1998) HK\$
Paul's	Longlife 500ml	5.8
	Longlife 3 x 1L	37.9
	Skim milk 1 L	10.5
Nestle Dairy Farm	Longlife 1L	12.3
	Sterilized 1L	8.5
	Longlife skim 1L	9.8
	Fresh pure 473/ml	11.7
	Hi-calcium 946/ml	23
Dutch Lady	Ster. low fat 200/ml	4.7
	Ster. plain 1 L	12.4
	Ster flavored 200/ml	4.7
No Frills	UHT 1 L	8.4
Kowloon Dairy	Fresh 946/ml	23
	Hi-calcium 946/ml	19.2

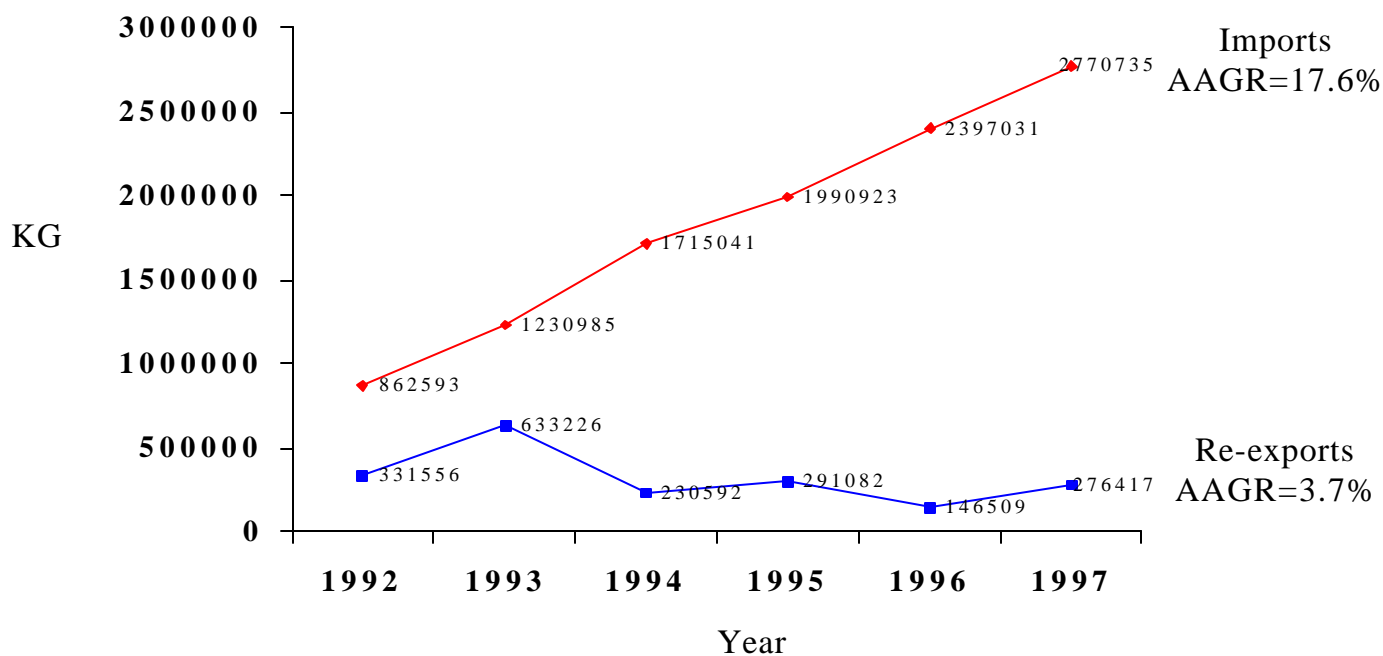
**Other Milk Products**

Brand	Product	Price (1998) HK\$
Carnation	Evap. milk 410g	8.3
	Filled evap.mk 410g	7.7
Dutch Lady	Evap. Milk 410g	7.6
	Evap. Milk 170g	4.3
No Frills	Evap. Milk 410g	5.5
	Condensed milk 397g	5.5
Eagle	Condensed milk 397g	7.4
Longevity	Condensed milk 397g	7.7
Nespray	Inst. Milk pwd 900g	61.7
Frisogrow	Growing up pwd 900g	96
Enfagrow	Growing up pwd 900g	98
Frisomel	High protein pwd 900g	113.2
Gain	Follow on pwd 1 kg	103
Nan Ha 2	Follow up pwd 900g	125

## YOGURT - IMPORTS

Imports for yogurt have grown steadily over the past five years with an Average Annual Growth Rate of 17.6%. Local demand is driving imports. Re-exports and Hong Kong exports have fallen. With a decline in re-export demand, Hong Kong producers, traders and distributors handling imported yogurt products are shying away from exporting and re-exporting because of the problems associated with handling and distributing a product that has a very limited shelf life. Yogurt production in China (PRC) has also reduced Hong Kong exports and re-exports significantly. Multinationals such as Danone, Nestle, Yoplait, & Kraft now have factories in China and produce yogurt locally, reducing the chance for opportunistic traders in Hong Kong to supply to the China market.

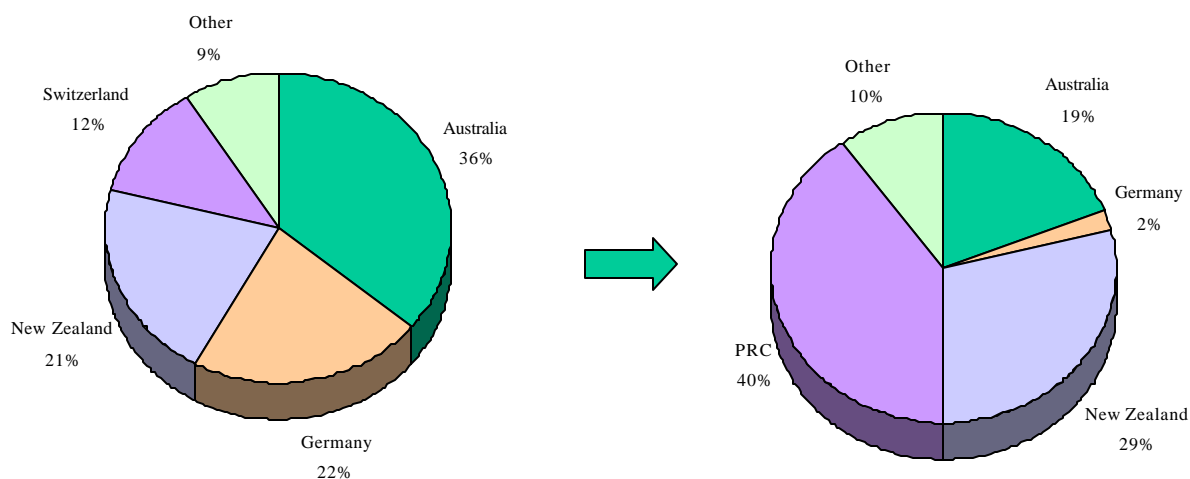
**Yogurt Imports and Exports  
1992-1997**



Source: Hong Kong Trade and Statistics Department

With import growth of 17.6% AAGR, yogurt imports increased from 862 MT in 1992 to 2,770 MT in 1997. In 1992, The Federal Republic of Germany accounted for 22% of all yogurt imports to Hong Kong. The Peoples Republic of China accounted for approximately three percent of all imports. In the mid 1990's, multinationals began to produce yogurt across the boarder in Guangdong Province, China. Close geographic proximity made Chinese yogurt imports very price competitive giving certain multinationals in China a competitive advantage over other suppliers who paid high cost in airfreight and handling charges. Traders and distributors believe that imports from China will continue to increase. Danone (France) is a significant multinational supplier with a factory in Guangzhou, supplies the Hong Kong market.

### Yogurt Imports by Country



Source: Hong Kong Trade development Council

## YOGURT - U.S. IMPORTS

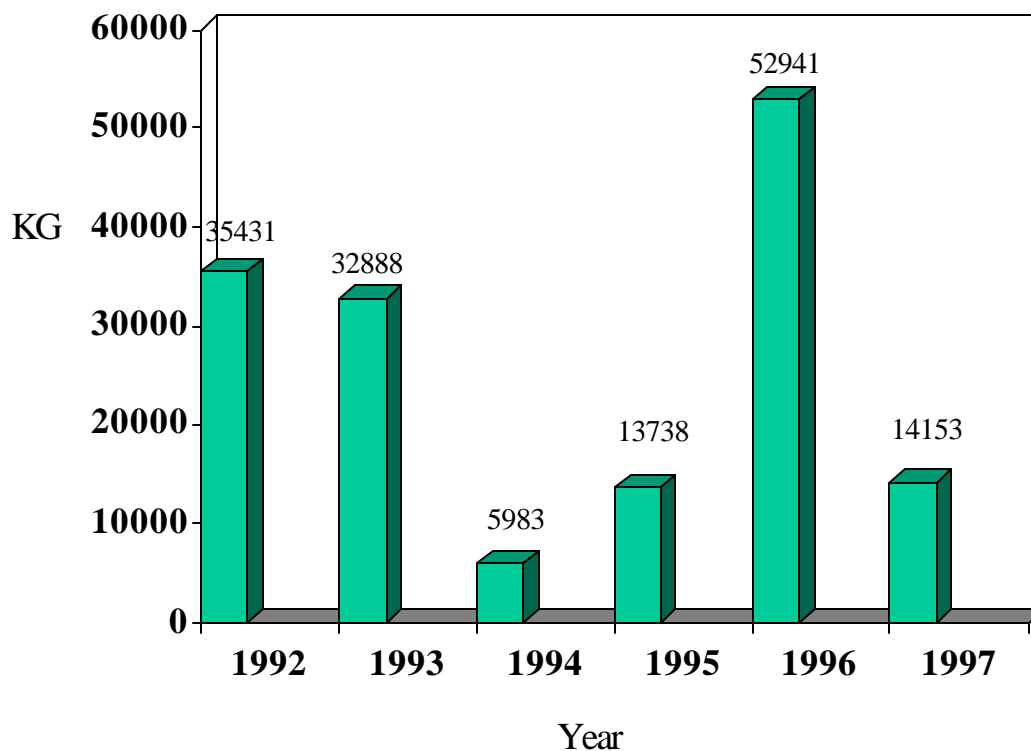
In the early 1990's, U.S. dairy producers were excited about the prospects of the Hong Kong market. An initial drive by U.S. producers to market yogurt in Hong Kong was received quite well. However since then a lack of consistent market support and promotion resulted in part in a decline of yogurt imports from the U.S.

In 1995, U.S. yogurt imports started to increase again and surged in 1996 to an all time high of 52,941 kg.

1997 again saw a decline in imports. Opportunities do exist for U.S. yogurt producers if traders, retailers and distributors can be assured of consistent, reliable support and quality products.

In 1995, the import market for yogurt increased and in 1996 reached an all time high of 52,941 KG. In 1997 a decline occurred again. Although there is an overall rate of decline of 20%, opportunity still exist for U.S. suppliers.

**U.S. Imports of Yogurt 1992 to 1997**



*Source: Hong Kong Trade development Council*

## YOGURT - LOCAL PRODUCTION

Local demand is estimated at 3,000 MT for 1997. This includes yogurt, yogurt drinks and a portion of the total lactobacillus based drinks like Yukult, Mini and Fantasy. Some of these imported drinks are classified as yogurt and other times classified as milk.

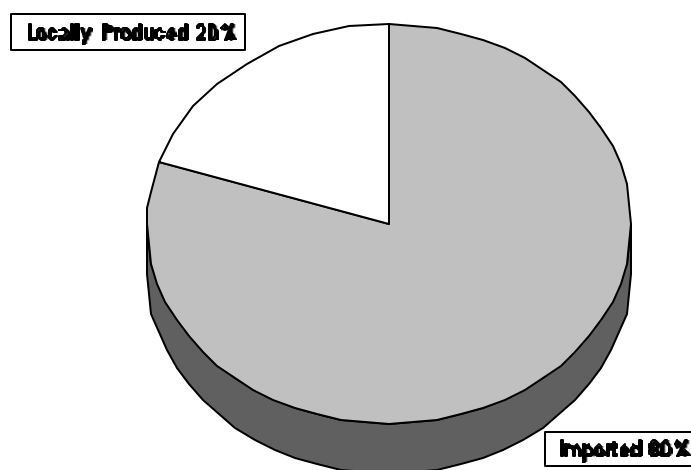
The majority of yogurt in the Hong Kong market is imported. It is estimated that 80% of the yogurt consumed in Hong Kong is imported and 20% is produced locally.

Nestle Dairy farm is the sole producer of yogurt in Hong Kong. They produce a variety of flavors that are suitable to the Hong Kong consumers taste. Strawberry, prune and local flavors from tropical fruits like mango and pineapple are the most popular. Imported yogurt does not address this flavor preference. Locally produced yogurt is much sweeter than imported yogurt. Imported yogurt is perceived by the Hong Kong consumer as being sour.

Yogurt producers have had difficulty locating distributors to carry their product. Yogurt with its limited shelf life has a high spoilage rate, and Hong Kong distributors prefer not to carry yogurt as they are held accountable for any spoiled product. The majority of supermarkets in Hong Kong purchase yogurt directly from the producer in the country of origin.

### Imported Yogurt Versus Locally Produced

1997

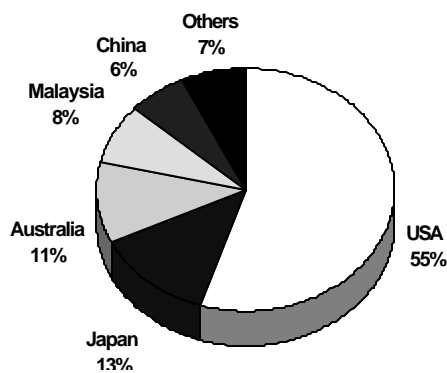
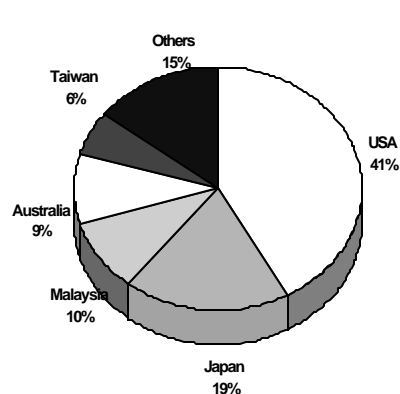


Local Demand 1997  
Estimate-3,000MT

Source: Eastern Strategic Consulting Ltd.

## ICE CREAM

- # US products have been leading ice-cream imports into Hong Kong. The share of imports increased from 40% in 1992 to more than 60% in 1996.
- C Although the Dreyer's contamination incident adversely affected US imports in 1997, over the entire year US suppliers should maintain above 50% share of imports
- C Haagen Dazs and Double Rainbow are two other US brands that saw their market share significantly improved in recent years
- # Other countries which play more important roles in imports are Japan, Malaysia, and Australia.
- C Japan's import share has declined from more than 20% in early 1990s to 12-13% in 1996-97, primarily due to high prices.
- C Malaysia and Australia have never been major players, but their import shares have greatly increased in 1996-97.
- C China is a recent entrant and their import shares have largely grown in 1996-97.
- # Other suppliers include UK, Netherlands, Taiwan, etc., but the overall quantities are small.
- # **For further information on Ice Cream, please refer to the "Market Brief on Frozen Desserts".**

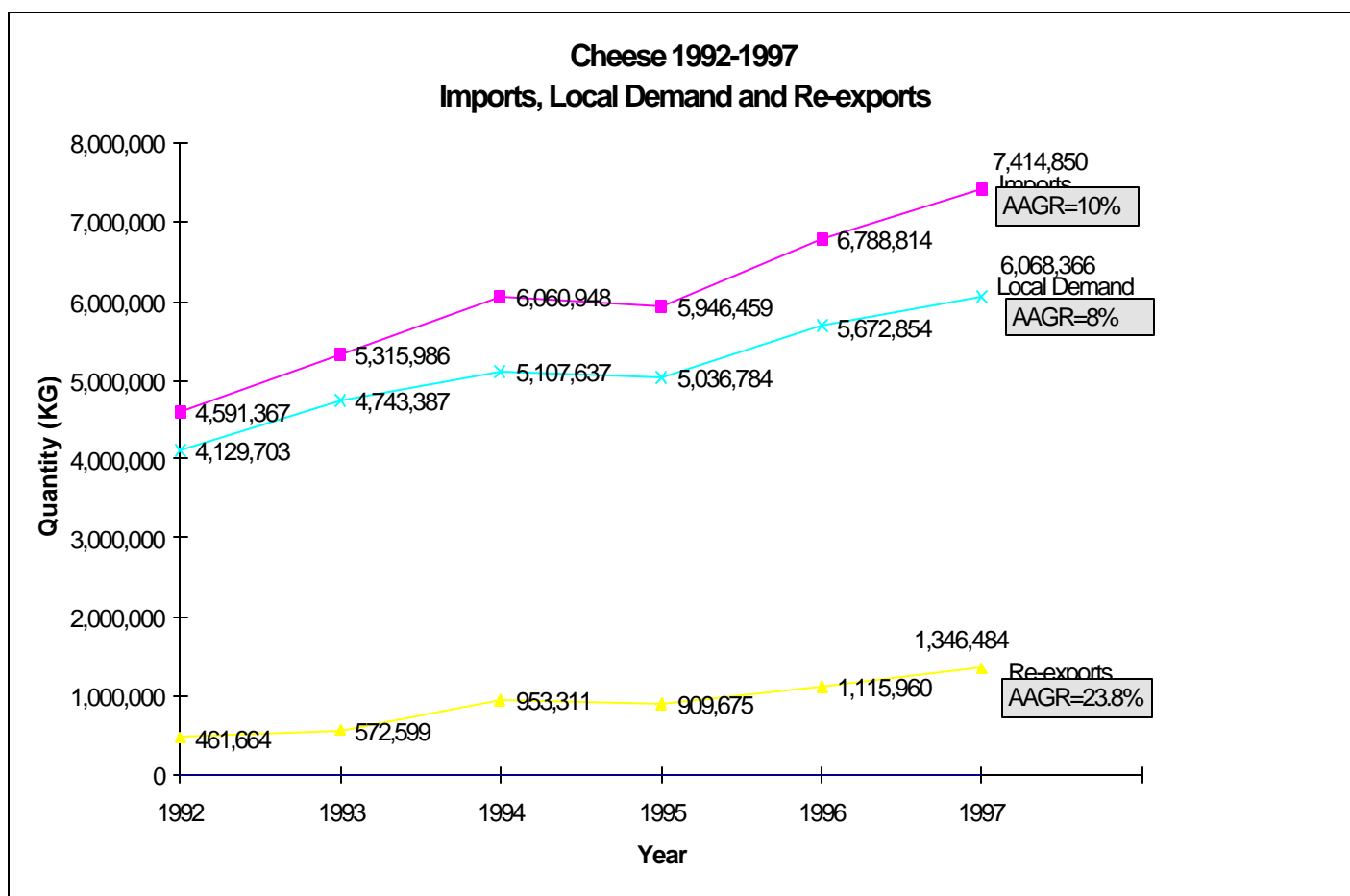


Source: HKTSD

## CHEESE OVERVIEW

**Total cheese imports have grown at an average annual rate of 10%. Local demand is the key driving force.** With local demand experiencing an Average Annual Growth Rate (AAGR) over the last five years of 8%, the majority of cheese remains in the Hong Kong market. However, re-exports have been growing quickly. An Average Annual Growth Rate of 24%, has local traders anticipating that Cheese re-exports will increase significantly in the years to come.

**For further information on cheese, please refer to the Market Brief on Cheese.**

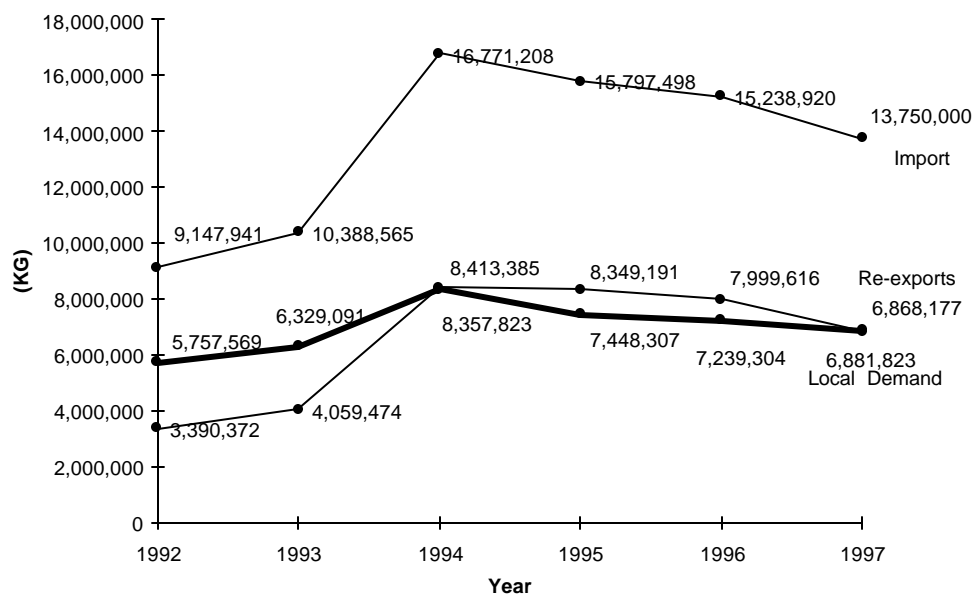


Source: HKCSD

## BUTTER - IMPORTS

- # From 1992 to 1994, local demand has been the driving force behind butter imports to Hong Kong. However as the Chinese economy began to pick up and cross boarder trade between Hong Kong and China flourished, Hong Kong established itself as a transshipment point for butter exports to China.
- # In the early 1990's, butter imports surged 35% AAGR. However, since 1994, butter imports have witnessed an annual decline at -7% AAGR. Local demand and re-exports have declined for a number of reasons. Chinese traders and market practices have become more sophisticated. Suppliers are finding it more convenient to deal with Chinese mainland buyers directly. Local demand is decreasing for a number of different reasons including the economic downturn adversely affected the food service sector.

Butter 1992-1997

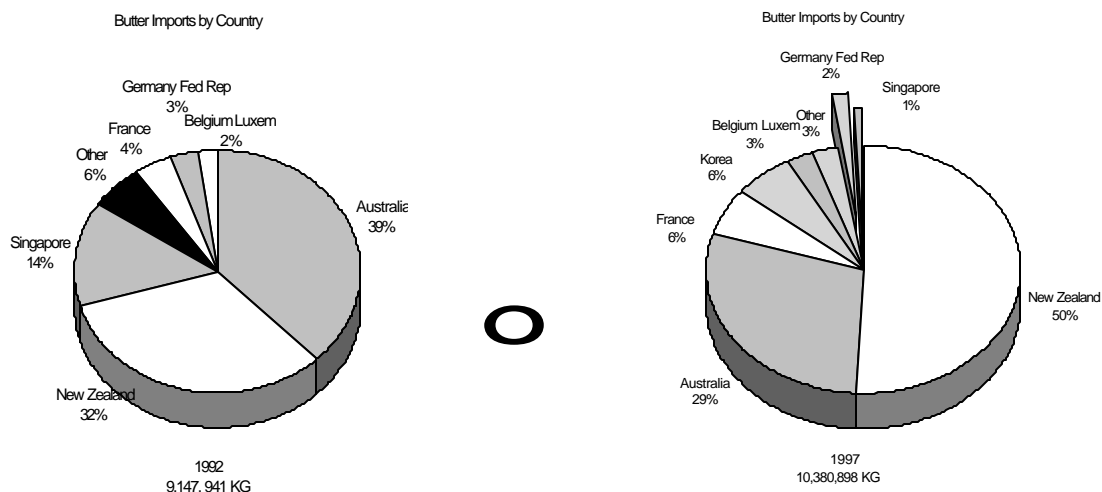


Source: HKCSD

## BUTTER - IMPORTS

In 1992, a total of fifteen countries were importing butter to Hong Kong with Australia as the key country importing 39% of all butter to Hong Kong. New Zealand was second with 32% of the market share and Singapore with 14% of the market. As there was no local production of butter in Singapore, these imports are believed to be re-exports from Australia, New Zealand and Europe.

In 1997, the situation has changed significantly. New Zealand producers now supply over 50% of all imported butter. Australia has lost market share and Singapore has declined in importance as an importer due to suppliers dealing directly with buyers in Hong Kong and China. The U.S. as well as other suppliers have entered the market. Currently there are a total of 18 countries supplying the market. The US accounts for less than 1 % of all imported butter.

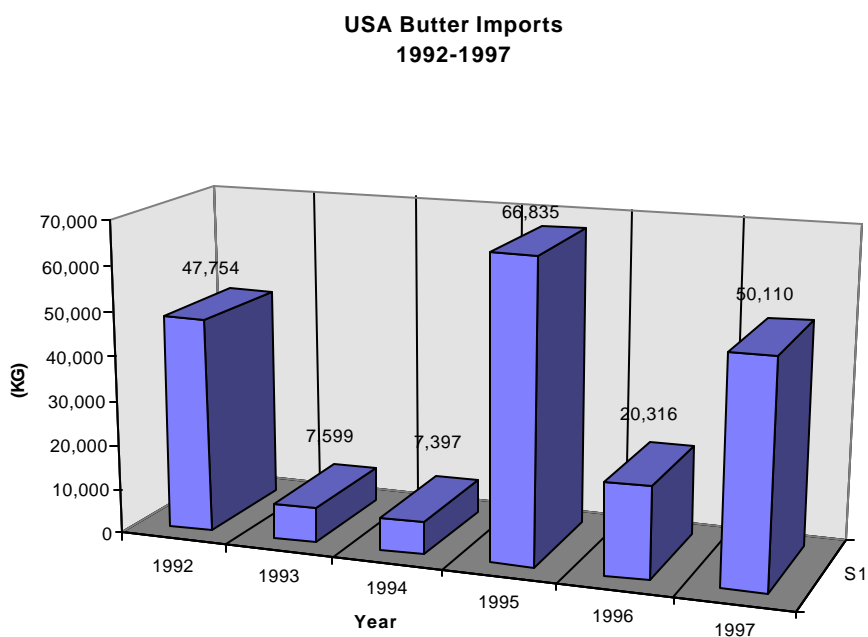


Source: HKCSD

## BUTTER - U.S. IMPORTS

Since 1992, U.S. imports of butter have grown at 10% AAGR. However, U.S. suppliers have been opportunistic in their approach to the Hong Kong market, limiting their ability to increase their overall market share.

There are opportunities for U.S. butter suppliers in the Hong Kong market. Traders and distributors view U.S. butter prices as being competitive in the market place, but cite lack of supply and promotion. U.S. supply has been inconsistent and lacks stability. In 1992 imports were 47,754 Kg. In 1993 and 1994 it dropped considerably and then surged to an all time high 66,835 Kg only to drop again. In 1997 imports increased again to 50,110 Kg.



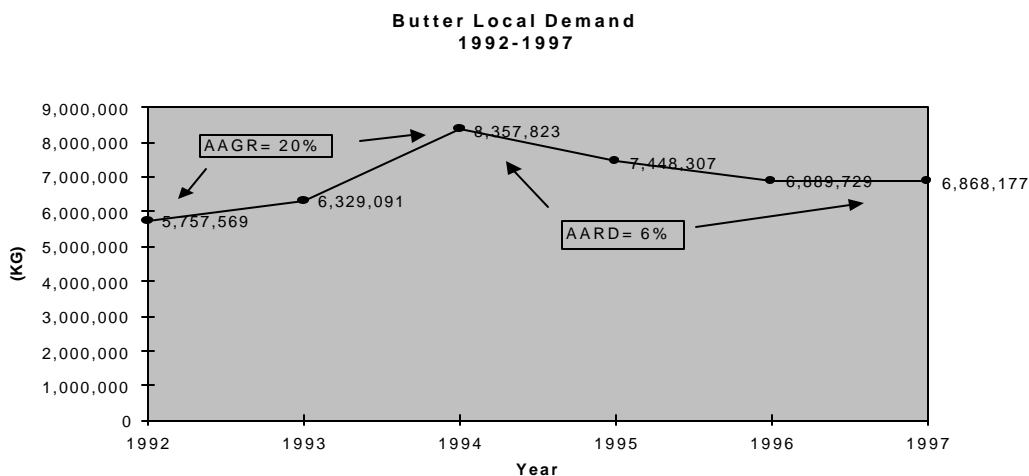
Source: HKCSD

## BUTTER - LOCAL DEMAND

From 1992 to 1994, butter imports surged at 35% AAGR. Local demand was the driving force, experiencing growth of 20% AAGR. However, since 1994 local demand for butter has been decreasing approximately -6% AAGR. There are a number of key reasons for this decline.

- Ⓒ The Hong Kong consumer has become more health conscious by choosing substitutes for butter such as margarine.
- Ⓒ Over the past few years, key suppliers have directed financial and marketing efforts toward the larger markets in the region such as Korea and Japan ignoring the Hong Kong market.
- Ⓒ Packaging issues have been a problem for many of the end users, discouraging purchases.

The market is expected to decline even further over the next few years due to the current economic crisis affecting both the institutional sector and retail sectors of the Hong Kong economy.



Source: HKCSD

## BUTTER - LOCAL DEMAND

The majority of butter in the Hong Kong market is used in the food service sector (approximately 55-65%). Hotels and restaurants use bulk packaged butter (10kg-25kg blocks) and smaller single serving packets.

The retail sector accounts for 35% to 45% of local demand. The butter is sold in supermarkets and high end speciality supermarkets that cater to consumers of imported food items.

Even though local demand is declining, opportunities remain in the retail and food sectors. Both sectors are constrained by a number of issues.

C      Unsalted butter is the preferable choice in the Hong Kong market.

C      In China, salted butter is preferred.



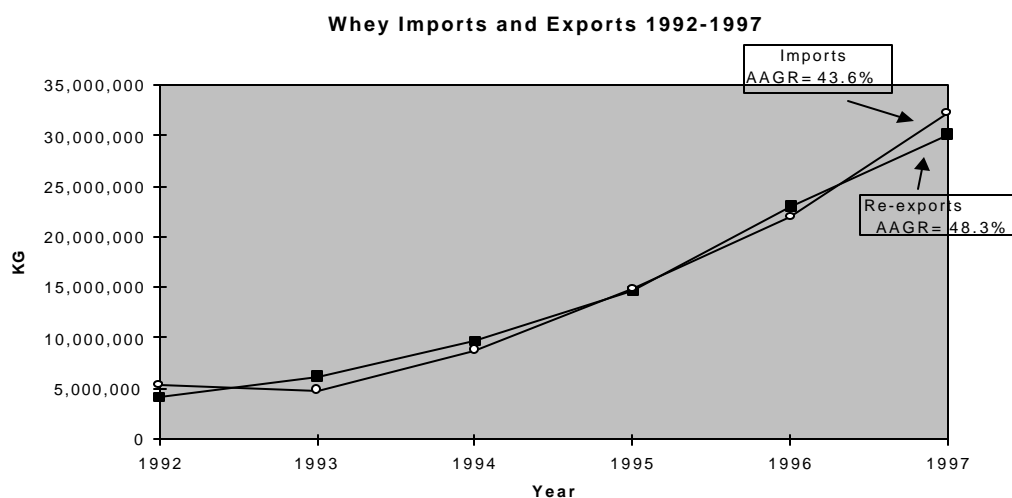
Source: Eastern Strategic Consulting Ltd.  
estimated

**BUTTER****Retail Pricing and Availability of Butter**

Brand	Product	Price-1998 (HK\$)	Country
Boy / Cow	Pure Cream Butter 227g	7.9	-
Daisy	Butter 227g	8.9	Australia
Lur Pak	Butter salted 227g	11.2	Denmark
	Butter unsalted 227g	11.2	
Hakata	Pure Creamer Butter 227g	7.5	Australia
NZ Dairy	Butter 227g	8.8	New Zealand
Anchor	227g	9.9	New Zealand
	113.5g (1/4 pound)	5.5	
	12 pads x 7g	8.4	

## WHEY - OVERVIEW

From 1992 to 1997, whey imports increased at an Annual Average Growth Rate (AAGR) of 48%. Very little imported Whey stayed in the Hong Kong market. Whey imports are driven by demand in China making Hong Kong a transshipment port. During the past five years, China and Macau received over 99% of the re-exported Hong Kong Whey. End users in Guangdong province producing Western style snack foods and other food items for export and the domestic market have been the largest consumer groups. As Chinese consumers continue to familiarize themselves with Western style food items, traders in Hong Kong expect the demand for Whey in China to continue to grow at its current rate for the next few years. Macau is also a transshipment point for products destined to China. It is understood that the majority of Whey exported to Macau ends up in China. Re-exports include exports of locally produced Whey, however this volume is insignificant.

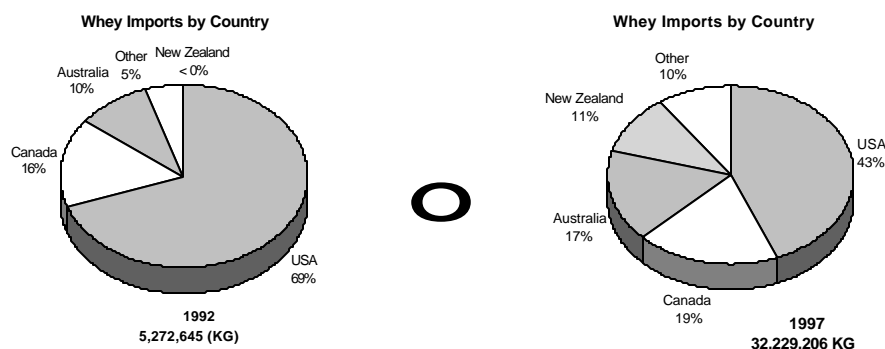


Source: HKCSD

## WHEY - OVERVIEW

In 1992, the United States was the main supplier of whey to the Hong Kong market and the China market. It accounted for 69% of the market share. Suppliers were able to offer competitive prices and in quantities traders demanded. Canada was the second largest supplier of whey and accounted for only 16% of total imports. Australia and New Zealand were also supplier countries, however their volumes were relatively low.

In 1997, the market for whey had increased significantly from 5,273 MT to 32,229 MT. However, U.S suppliers lost considerable market share. In 1997, United States suppliers still had 43 % of the market share. Suppliers from Canada, New Zealand and Australia have increased their share of the market by more effectively meeting end user needs, and by promoting and marketing whey in Hong Kong and China. New Zealand over the past five years was able to rapidly increase it's market share by over 10%.

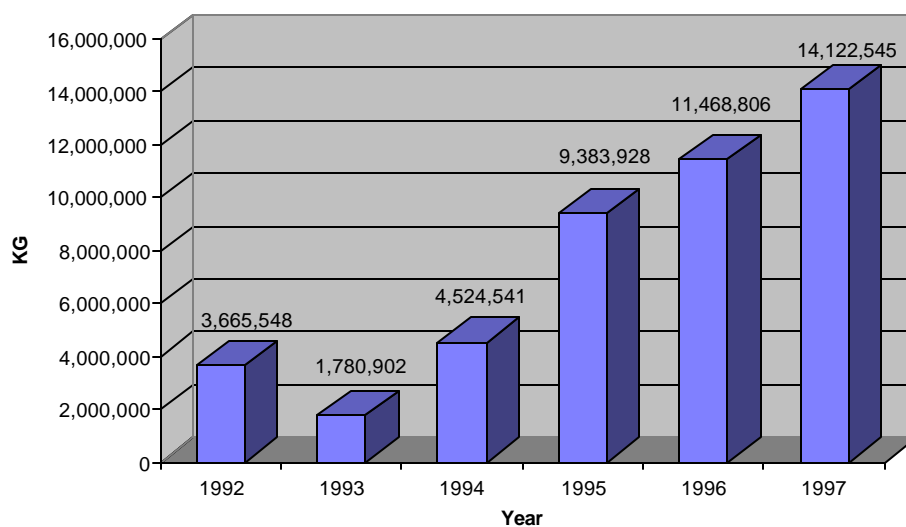


Source: HKCSD

## WHEY - OVERVIEW

U.S. whey imports increased at 31% AAGR from 1992 to 1997. Whey suppliers have been able to offer a consistent supply of product over the past five years. Although U.S. suppliers have seen their export volumes increase at a significant rate, they have experienced a market share decline. Suppliers in other countries such as New Zealand, Australia and Canada have been actively promoting their products in the region.

U.S. Whey Imports 1992-1997



Currently there are no restrictions or regulation for the importation and exportation of whey.

Source: HKCSD

## MARKETING & PROMOTION

### Advertising

- # Dairy products are not frequently advertised on TV.
- C Paul's is the most aggressive in terms of TV advertisements, with both milk and yoghurt.
- C Suppliers and distributors work closely with retail outlets offering coupons and discounts. Promotional material is often given to the supermarket so that they may pass the information onto the consumer.

### Marketing Programs

- # There are relatively few marketing programs for U.S. dairy products in Hong Kong.
- C Consumers are generally unaware of U.S. dairy products in terms of brand (Except Dreyers and Haagen Dazs ice cream and processed cheese slices (Kraft)).
- C However, most local distributors are aware that U.S. dairy products are of premium quality.

### Promotion

- # Promotional activities are very inconsistent for American dairy products (with the exception of Kraft).
- C This has resulted in extreme fluctuation of import volumes and overall unstable supply.
- C Suppliers from other countries (NZ, Australia, the Netherlands) have been very consistent in their efforts to promote their products. Australian suppliers visit their distributors/retailers up to four times a year to inquire about problems, promote, resolve issues and overall ensure that they are in good standing with their distributors/retailers. Recently the Australia Dairy Corporation launched an education promotion campaign in Hong Kong and the Southern China area. The campaign included free seminars for distributors, retailers and wholesalers interested in carrying Australian dairy products. Free samples were given out, demonstrations on cooking with Australian dairy products were held, and educational seminars on how to contact suppliers and import Australian dairy products were also held.

## RULES & REGULATIONS

- # Hong Kong's food and labeling laws have been in effect since August 9, 1987. These laws established the a slightly different requirements for the marketing and labeling of prepackaged foods such as dairy products. Each dairy product may have a slightly different regulating or rule governing its importation. Therefore the following is intended for reference only.
- # As Hong Kong is a free port, there is no import duty on food products.
- # For prepackaged foods or those that the contents can not be altered without opening or changing the packaging and for which the food is ready for presentation to the consumer or institutional users must contain the following information:
  - C Name, ingredients--in descending order of weight of volume, shelf life, conditions of storage and use, weight and volume, and name address of manufacture or packer.
  - C Products must indicate shelf life of product in both English and Chinese.
  - C Dates must in English and Chinese unless Arabic numbers are used and be expressed in terms of day, month and year.
  - C If special storage conditions are required and explanatory statement must be included on the products label.
- # It is not necessary to have complete Chinese language used if the information is provided in full English; however, at a minimum, the package must state in Chinese "Consume before date stamped on package". If both languages are used, then the product name and ingredients must appear in both languages.
- # The importation of cheese into Hong Kong is governed by the Food and Drugs of the Public Health and Municipal Services Ordinances Cap. 132 and its subsidiary legislation which are enforced by the Hygiene Division of the Department of Health.
- # Most traders and importers are aware of these regulations and may provide the supplier with a copy of such regulations. However it is up to the responsibility of the supplier to have the appropriate labeling and packaging for the market before product is shipped.

## RULES AND REGULATIONS

# Other regulations may apply as follows for certain dairy products:

- C Sample inspection reports by chemical analysis and bacteriological examination, showing contents of fats, sugar, milk-solids, and bacteria count.
- C Consignments of fresh dairy products must be contained in refrigerated facilities.
- C The local health department will conduct sampling and analysis upon arrival of frozen dessert shipments. Therefore appropriate correspondence between the importer and the health ministry is necessary.
- C Packaging requirements must comply with the Hong Kong Food and Drug Regulations, which includes proper labelling of item, ingredients, shelf-life, storage and care instructions, and other product specifications including volume and weight.

# The Hong Kong legislation has specified that there are only two product categories, namely UHT and fresh. Milk with added vitamins, for example, Vitamin D or C must be classified as a “milk drink”.

# Details of import regulations can be obtained from the Hong Kong government at Wu Chung House, 18th Floor, 213 Queen’s Road east, Wanchai, Hong Kong.:

- C Also, the Health Department provides telephone hotline service for import regulations at (852) 2380-2580 and direct facsimile at (852) 2845-0943.

## RECOMMENDATIONS

# American dairy products are generally perceived as high quality, which is a distinct advantage to most U.S. suppliers. However, Americans are not successful in Hong Kong because of higher product pricing, as well as a lack of promotion and inconsistent efforts in marketing their dairy products. Of equal importance is that the import approval process is extensive and time consuming. As a consequence, supply has been erratic and inconsistent, a situation other importers have taken advantage of to improve their market shares in Hong Kong. However, this should not be discouraging to U.S. producers. There are certain advantages that U.S. suppliers enjoy and ones that can be used to help gain market share.

### # Milk

C The UHT milk market in Hong Kong is declining as fresh milk supplied from the Chinese mainland is taking its place. Hong Kong consumers are becoming more health conscious and therefore selective in the kinds of milk they purchase. They perceive fresh milk as being healthier than UHT milk. It is not recommended that U.S. producers target this market as there appears to be little potential in this segment.

C The Powdered Milk market has been increasing over the last few years and is expected to keep growing. Competition is not intense and there is room for other producers. Key marketing efforts should be directed towards supplying powdered milk that is beneficial for soon to be mothers. U.S. suppliers should look closely at this market.

C Evaporated Milk is a large market with only a few key suppliers. The market is expected to grow and U.S. producers should seriously consider this market as potential is great.

C The Condensed Milk market is declining and the size of the market is relatively small. There appear to be relatively few opportunities in this market for U.S. suppliers.

### # Yogurt

C The yogurt market in Hong Kong is growing. However, Hong Kong consumers view imported yogurt as too sour. If U.S. suppliers can deal directly with retail outlets and guarantee a stable supply that is suitable to the Hong Kong consumers tastes and at a competitive price, there is potential for increased market share.

### # Ice Cream

C The U.S. already dominates this market. New U.S. suppliers should focus on the premium end of the market. Please see the Hong Kong Ice Cream Market Brief for more details.

## RECOMMENDATIONS

### # Cheese

- C U.S. producers have advantages in certain segments of this market. The overall market is growing despite the 1997 economic downturn. Producers should have a consistent approach to marketing and promoting their products. There are opportunities to be gained in this market. Please see the Hong Kong Cheese market Brief for more details.

### # Butter

- C Butter imports surged in the early 1990's and since then the market has been declining as Hong Kong consumers become more health conscious about their fat intake. Many consumers are relying on butter substitutes such as margarine. Despite the market decline, there are opportunities for U.S. producers who strive to supply the correct packaging in the institutional sector as this sector is constrained by packaging issues.

### # Whey

- C U.S. suppliers dominate imports. The market in Hong Kong is relatively small. However, the China market is enormous as most whey is re-exported to China. Although the U.S. dominated this market over the last few years they have lost market share to New Zealand and Canada. It is recommended that promotional activities be increased in Hong Kong among the traders that re-export product to China and in China among the end users. New Zealand and Canada have been very active over the last few years and desperately want to dominate the market for whey in China.

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**The Country's Best Yoghurt(TCBY)**

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**Silco International Ltd.**

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**Wellcome Co. Ltd**

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Company Registry	<a href="http://www.info.gov.hk/cr/">http://www.info.gov.hk/cr/</a>	crenq@cr.gcn.gov.hk
Consumer Council	<a href="http://www.consumer.org.hk">http://www.consumer.org.hk</a>	cc@consumer.org.hk
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